State Of Montana

Teachers'

Retirement System

Biennial Report

FOR FY2010

Should you have any questions or comments regarding this template, or desire additional copies, please contact:

Warren Dupuis
CIO Support Officer
Telephone: 406-444-0415
E-mail: wdupuis@mt.gov
Website: *http:/www.mt.gov/itsd/stratplan/statewideplan.asp*

INFORMATION TECHNOLOGY SERVICES DIVISION

Dick Clark, CIO

Warren Dupuis, CIO Support Officer

May 1, 2010

TABLE OF CONTENTS

EXECUTIVE SUMMARY

The Teachers' Retirement System has been able to maintain its existing Pension System and FileNet systems, bringing both these systems up to the latest software releases, using the latest operating systems, and residing on the most current hardware. The TRS virtualized its servers using a small blade/SAN in anticipation of placing this equipment in the State Data Center. As part of the purchase, the TRS negotiated a three to five year maintenance package that provides 24 x 7 supports at a greatly reduced cost. The TRS staff and members have realized the benefits in the following ways: uninterrupted services during the migration, fully supported hardware and software, increased information security.

The TRS completed its LDPRS documentation and participated in a city wide disaster exercise. These activities helped clarify key business concepts for the TRS and lines of communication. The TRS will continue to prepare its operations for likely disaster events. One part of the disaster recovery plan is to house the new TRS hardware in the data center when space becomes available. The remainder of the disaster recovery and business continuity plan relies on additional training for both technical and non-technical staff.

The TRS had no major initiatives during the biennium.

SECTION 1: AGENCY IT PLAN ACCOMPLISHMENTS – GOALS & OBJECTIVES

Complete this section by copy and pasting the Goals and Supporting Objective/Actions listed in section 4.1 of your agency's 2008 plan. After each supporting objective, insert the two additional questions for accomplishments and status. Answer these two questions.

1.1 Goals

Goal Number 1: (taken from 2008 plan and 2009 update)

ITG 1   Pension System Maintenance

Description: Complete updates, maintenance, and clean up of small Pension+ projects, includes:

Automatic interest calculation on dormant accounts reinstated to active status
Update member addresses via employer records using on-line wages and contribution data file
Allow active member to review their accounts on-line
Allow retired member to review their accounts on-line
Upgrade the OpenVMS operating system to latest version
Upgrade the Powerhouse application environment to latest version

Benefits: Decrease inquiry phone calls and make self-service access easy. Maintain currency with all software versions to avoid bugs and downtime.

Which state strategic goal(s) and/or objective(s) does your goal address? Supports the goal to develop IT resources in an organized, deliberative and cost-effective manner by fine tuning an existing IT system. Collecting addresses from employers will support the goal of improving government services by allowing the TRS to mail statement directly to members.

Supporting Objective/Action

ITO 1-1   Maintain current maintenance agreements for software support for Pension+, OpenVMS, and Powerhouse

Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%): 100% of maintenance agreements renewed; annual costs cut in half with 5 years rates on new hardware.

Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): On-going.

Goal Number 2: (taken from 2008 plan and 2009 update)

ITG 2   Comprehensive and Well Practiced Disaster Recovery and Business Continuity Services

Description: Develop the means to recreate and recover all business services in less than 4 hours from anywhere using limited staff.

Benefits: What benefits are realized and who realizes the benefits? Provides assurance that TRS can fulfill its obligations to members and retirees in a useful way in case of an emergency. Provides a means to work with other state agencies in practicing and coordinating disaster services. The measure of success is to setup a business continuity site in four hours, run TRS operations on such a site for a couple days, and restore the

recovery site to the home site in four hours. The practice of disaster recovery occurs twice a year. The plan contains longer recovery scenarios for timelines up to one year.

Which state strategic goal(s) and/or objective(s) does your goal address? This will improve government services by assuring retired teachers continued to receive benefits during a disaster. A side benefit is the means to achieve this improve the means by which the TRS protects individual privacy and the privacy of information contained within its IT systems.

Supporting Objective/Action

ITO 2-1 Continue with COOP and DR training, requirements definition, and planning

Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%): 50% complete. TRS has implemented new hardware, performed table top practices, participated in preparedness activities. The TRS needs to do its yearly update, move hardware to the data center for security and power.

Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): On-going.

Supporting Objective/Action

ITO 2-2 Purchase, implement, and train TRS staff on backup computer system and processes associated with COOP and DR.

Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%): 75% complete. Purchased new system with robust backup capabilities, but was unable, because of budget to purchase secondary backup system. Implemented high availability for blades.

Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): Deferred until Data Center becomes available for agency equipment.

Goal Number 3: (taken from 2008 plan and 2009 update)

ITG 3 Upgrade and virtualize the TRS server environment

Description: The TRS wants to take advantage of virtualization in its next hardware upgrade.

Benefits: Virtualization seems to be the next step in technology that allows for small, energy efficient hardware platforms that allow for the greatest flexibility in configuration. These configurations such as HP's c3000 or IBM's Blade Server S may allow the TRS to have small, integrated, yet mobile systems that can be used for production, as a hot backup, and in an emergency.

Which state strategic goal(s) and/or objective(s) does your goal address? This goal supports the state IT plan by developing IT resources in an organized, deliberative and cost-effective manner. Features of virtualization, such as virtualized workstations, protect individual privacy and the privacy of information contained within IT by removing desktop storage. Finally, the newer hardware will improve the speed of IT services and the ability of the IT staff to recover in an emergency.

Supporting Objective/Action

ITO 3-1 Research and purchase equipment and software that supports virtualization.

Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%): 100% complete. TRS has implemented virtualization for servers and has forward strategy for virtualized desktops.

Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): Completed.

Supporting Objective/Action

ITO 3-2   Design and engage a migration plan for hardware and software.

Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%): 100% complete. Migration done.

Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): Completed.

Goal Number 4: (taken from 2008 plan and 2009 update)

ITG 4   Maintain FileNet System While Improving Workflow Analysis, Implementation, and Design

2Description: The TRS wants to take advantage of virtualization in its next hardware upgrade.

Description: Use Filenet P8 to automate and track incoming, on-going, and completed work as measured by volume of correspondence under workflow control. The measure of success is to build one application to allow a request of benefits.

Benefits: The TRS will have a current and working workflow process for its business processes involving high volumes of paper.

Which state strategic goal(s) and/or objective(s) does your goal address? This goal develops IT resources in an organized, deliberative and cost-effective manner. The TRS workflow project will use existing ITSD resources to accomplish the TRS goal.

Accomplishments (describe what the agency has done to achieve this objective, list percentage of accomplishment e.g. 50%): 20% complete. TRS has updated its FileNet services with the latest in upgrades. The TRS is looking for an outside consultant who specializes in small office implementation to be some assistance in implementing workflow.

Status (completed, substantially completed, deferred, delayed, cancelled, or on-going): On-going.

SECTION 2: IT INITIATIVES STATUS UPDATE

Complete this section by copy and pasting the IT Initiatives listed in section 7.1 of your agency's 2008 plan. After each initiative, insert the two additional questions for status and funding. Answer these two questions.

2.1 IT Initiatives *(Taken from 2008 plan and 2009 update)*

No Initiatives.

SECTION 3: ADDITIONAL INFORMATION - OPTIONAL

Other types of information that your agency may wish to report as accomplishments or challenges related to achieving the Goals, Objectives, and Initiatives outlined in your 2008 IT plan.

No comment.